

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  <i>(use as many sheets as necessary)</i>				<b>Complete if Known</b>	
Application Number		Not yet assigned			
Filing Date		February 20, 2004			
First Named Inventor		David S. MILLER			
Group Art Unit		Not yet assigned			
Examiner Name		Not yet assigned			
Attorney Docket Number		31921-192598			

U.S. PATENT DOCUMENTS						
Examiner Initials	Cite No. <sup>1</sup>	U.S. Patent Document		Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
		Number	Kind Code <sup>2</sup> (if known)			
<div style="font-size: 2em;">SMP</div> <div style="font-size: 4em; margin-top: 20px;">}</div>	A1	5,706,442		Anderson et al.	01-06-1998	
	A2	5,802,511		Kouchi et al.	09-01-1998	
	A3	6,023,694		Kouchi et al.	02-08-2000	
	A4	6,026,392		Kouchi et al.	02-15-2000	
	A5	6,131,115		Anderson et al.	10-10-2000	
	A6	5,799,283		Francisco et al.	08-25-1998	
	A7	6,183,140	B1	Singer et al.	02-06-2001	
	A8	6,289,319	B1	Lockwood	09-11-2001	
	A9	6,311,170	B1	Embrey	10-30-2001	
	A10	6,347,304	B1	Taricani, Jr.	02-12-2002	
	A11	5,875,433		Francisco et al.	02-23-1999	
	A12	5,505,461		Bell et al.	04-09-1996	
	A13	5,819,249		Dohanich et al.	10-06-1998	
	A14	5,875,435		Brown	02-23-1999	
	A15	5,644,742		Shen et al.	07-01-1997	

FOREIGN PATENT DOCUMENTS								
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document			Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sub>6</sub>
		Office <sup>3</sup>	Number <sup>4</sup>	Kind Code <sup>5</sup> (if known)				

Examiner Signature		Date Considered	3/2/05
-----------------------	--	--------------------	--------

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> See attached Kinds of U.S. Patent Documents. <sup>3</sup> Enter Office that issued the document, by the two-letter code (WIPO Standard ST.3). <sup>4</sup> For Japanese patent documents, the indication of the year of the reign of the Emperor must precede the serial number of the patent document. <sup>5</sup> Kind of document by the appropriate symbols as indicated on the document under WIPO Standard ST. 16 if possible. <sup>6</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

ATTORNEYS AT LAW

PLEASE type a plus sign (+) inside this box →



PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

Substitute for form 1449A/PTO

## INFORMATION DISCLOSURE STATEMENT BY APPLICANT

(use as many sheets as necessary)

Sheet 2 of 11

### Complete if Known

Application Number	Not yet assigned
Filing Date	February 20, 2004
First Named Inventor	David S. MILLER
Group Art Unit	Not yet assigned
Examiner Name	Not yet assigned
Attorney Docket Number	31921-192598

### U.S. PATENT DOCUMENTS

Examiner Initials	Cite No. <sup>1</sup>	U.S. Patent Document		Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
		Number	Kind Code <sup>2</sup> (if known)			
SMP	B1	4,554,418		Toy	11/19/1985	
	B2	4,713,761		Sharpe, et al.	12/15/1987	
	B3	4,727,243		Savar	02/23/1988	
	B4	4,890,228		Longfield	12/26/1989	
	B5	4,961,158		Sussman	10/02/1990	
	B6	5,117,355		McCarthy	05/26/1992	
	B7	5,138,549		Bern	08/11/1992	
	B8	5,193,057		Longfield	03/09/1993	
	B9	5,202,826		McCarthy	04/13/1993	
	B10	5,287,268		McCarthy	02/15/1994	
	B11	5,521,815		Rose, Jr.	05/28/1996	
	B12	5,546,303		Helbling	08/13/1996	
	B13	5,555,497		Helbling	09/10/1996	
	B14	5,694,322		Westerlage, et al.	12/02/1997	
	B15	5,724,523		Longfield	03/03/1998	
	B16	5,774,872		Golden	06/30/1998	

### FOREIGN PATENT DOCUMENTS

Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document			Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sub>6</sub>
		Office <sup>3</sup>	Number <sup>4</sup>	Kind Code <sup>5</sup> (if known)				

Examiner  
Signature

S. Diaz

Date  
Considered

3/2/05

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> See attached Kinds of U.S. Patent Documents. <sup>3</sup> Enter Office that issued the document, by the two-letter code (WIPO Standard ST.3). <sup>4</sup> For Japanese patent documents, the indication of the year of the reign of the Emperor must precede the serial number of the patent document. <sup>5</sup> Kind of document by the appropriate symbols as indicated on the document under WIPO Standard ST. 16 if possible. <sup>6</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

PLEASE type a plus sign (+) inside this box →



Approved for use through 10/31/2002. OMB 0651-0031

Veritas  
PTO/SB/08A (08-00)  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box → +

PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  <i>(use as many sheets as necessary)</i>		Complete if Known	
		Application Number	Not yet assigned
		Filing Date	February 20, 2004
		First Named Inventor	David S. MILLER
		Group Art Unit	Not yet assigned
		Examiner Name	Not yet assigned
Sheet	3	of	11
		Attorney Docket Number	31921-192598

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SD	C1	TOM NEGRINO, "Quicken Deluxe 6", MacWorld Reviews, February 1996, pp. 1-3, <a href="http://www.macworld.com/1996/02/reviews/1851.html">www.macworld.com/1996/02/reviews/1851.html</a>	
	C2	"Microsoft Online-Banking Strategy Gains Wide Industry Support", May 8, 1996, pp. 1-2, <a href="http://www.microsoft.com/PressPass/press/1996/may96/hmbankpr.asp">www.microsoft.com/PressPass/press/1996/may96/hmbankpr.asp</a>	
	C3	"Intuit Will Create Comprehensive Framework For Financial Data Exchange Using The Internet", September 16, 1996, pp. 1-4, <a href="http://www.intuit.com/corporate/press_releases/091696b.html">www.intuit.com/corporate/press_releases/091696b.html</a>	
	C4	"Microsoft Delivers Open Internet Banking Solutions Today", September 30, 1996, pp. 1-4, <a href="http://www.microsoft.com/PressPass/press/1996/sept96/INETBKPR.asp">www.microsoft.com/PressPass/press/1996/sept96/INETBKPR.asp</a>	
	C5	"Intuit, Microsoft and Checkfree Create Open Financial Exchange", January 16, 1997, pp. 1-6, <a href="http://www.intuit.com/corporate/press_releases/011697.html">www.intuit.com/corporate/press_releases/011697.html</a>	
	C6	"Intuit Makes Tax Preparation Software Available Free On The Internet", January 27, 1997, pp. 1-2, <a href="http://www.intuit.com/corporate/press_releases/012797.html">www.intuit.com/corporate/press_releases/012797.html</a>	
	C7	"Confusing Tax Lingo Delays Americans From Filing", February 3, 1997, pp. 1-2, <a href="http://www.intuit.com/corporate/press_releases/020397.html">www.intuit.com/corporate/press_releases/020397.html</a>	
	C8	"Open Financial Exchange Winning Broad Support From Financial Services And Technology Companies", February 19, 1997, pp. 1-3, <a href="http://www.intuit.com/corporate/press_releases/021997.html">www.intuit.com/corporate/press_releases/021997.html</a>	
	C9	"Open Financial Exchange - About OFX", 1 page, <a href="http://www.ofx.net/ofx/ab_main.asp">www.ofx.net/ofx/ab_main.asp</a>	
	C10	This Week's Lead Story #1: Highwaymaster, TTSI to Offer Automated Fuel Tax Reporting, <i>Inside ITS</i> , September 11, 1995.	
V	C11	Qualcomm Press Release, March 12, 1997, QUALCOMM Introduces OnTrax State Mileage Reporting Software.	

Examiner Signature	S. Dwy	Date Considered	3/2/05
--------------------	--------	-----------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box →



PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO		<b>Complete if Known</b>	
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)		Application Number	Not yet assigned
		Filing Date	February 20, 2004
		First Named Inventor	David S. MILLER
		Group Art Unit	Not yet assigned
		Examiner Name	Not yet assigned
		Attorney Docket Number	31921-192598
Sheet	4	of	11

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SD	D1	"Linking Quicken to TurboTax"(with two pages of Table of Contents), pp. 1-3, <a href="http://www.cma.zdnet.com/book/quicken/ch22/ch22.htm">www.cma.zdnet.com/book/quicken/ch22/ch22.htm</a>	
	D2	"QIF Definition", pp. 1-6, <a href="http://www.respmech.com/mym2qifw/qif_new.htm">www.respmech.com/mym2qifw/qif_new.htm</a>	
	D3	"Quicken - Answers", pp. 1-2, <a href="http://www.intuit.com/support/quicken/faqs/win3/5176.html">www.intuit.com/support/quicken/faqs/win3/5176.html</a>	
	D4	"Quicken Deluxe 98", pp. 1-4, <a href="http://www.mcronline.com/Quicken98.htm">www.mcronline.com/Quicken98.htm</a>	
	D5	"Quicken Deluxe 98: taxes", pp.1-2, <a href="http://www.cnet.com.sg/Briefs/Comparisons/Money/ss02g.html">www.cnet.com.sg/Briefs/Comparisons/Money/ss02g.html</a>	
	D6	"Quicken QIF Alert", pp.1-4, <a href="http://www.fi.inuit.com/technical/qif_fi_alert.cfm">www.fi.inuit.com/technical/qif_fi_alert.cfm</a>	
	D7	"Shortcutz", Intuit Quicken® 99", pp. 1-2, <a href="http://www.educationalmultimedia.com/shortcutz/spreadsheets/quicken99.cfm?1">www.educationalmultimedia.com/shortcutz/spreadsheets/quicken99.cfm?1</a>	
	D8	Randall, et al., "First Looks", Massachusetts CPA Review, Vol. 70, No. 1, pp. 30-32, Winter 1996.	
	D9	Brozovsky, et al., "Tax Deposits Go Electronic", CPA Journal, Vol. 65, No. 12, pp. 53-54, December 1995.	
	D10	"Tax Prep Software: Out Third Annual 1040 Face-Off", Accounting Technology, Vol. 10, No. 10, pp. 20-63, November 1994.	
✓	D11	"SALES/USE Tax System", Taxware International, Inc., September 1999, <a href="http://www.taxware.com/ZProducts/salesuse/sutaxsys.html">http://www.taxware.com/ZProducts/salesuse/sutaxsys.html</a>	

Examiner Signature	<i>S Gray</i>	Date Considered	3/2/05
--------------------	---------------	-----------------	--------

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box → +

PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)				<b>Complete if Known</b>	
Sheet	5	of	11	Application Number	Not yet assigned
				Filing Date	February 20, 2004
				First Named Inventor	David S. MILLER
				Group Art Unit	Not yet assigned
				Examiner Name	Not yet assigned
				Attorney Docket Number	31921-192598

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
JUD	E1	PAM THOMPSON, "Quicken Deluxe", October 23, 1997, pp. 1-4, <a href="http://www.macobserver.com/reviews/quicken98.shtml">www.macobserver.com/reviews/quicken98.shtml</a>	
	E2	TurboTax "What are the limitations of Quicken Taxlink?", May 14, 2001, pp. 1-2, <a href="http://www.intuit.com/support/turbotax/faqs/ty99/win/1169.html">www.intuit.com/support/turbotax/faqs/ty99/win/1169.html</a>	
	E3	SERVICE & SUPPORT, "Using TaxLink With ProSeries Products-Technical Tip", May 14, 2001, pp. 1-2, <a href="http://www.proseries.com/service_support/1999/faqs/docs/10116.shtml">www.proseries.com/service_support/1999/faqs/docs/10116.shtml</a>	
	E4	Quicken, "How do I import QIF files into Quicken that I downloaded from my Financial Institution", May 14, 2001, pp. 1-2, <a href="http://www.intuit.com/support/quicken/faqs/win3/5176.html">www.intuit.com/support/quicken/faqs/win3/5176.html</a>	
	E5	Quicken, "Exporting Quicken data", May 14, 2001, pp. 1-2, <a href="http://www.intuit.com/support/quicken/faqs/docs/w_export.html">www.intuit.com/support/quicken/faqs/docs/w_export.html</a>	
	E6	Quicken, "Exporting and Importing Quicken Data", 2000, pp. 1-2, <a href="http://www.intuit.com/support/quicken/faqs/docs/w_export-import.html">www.intuit.com/support/quicken/faqs/docs/w_export-import.html</a>	
	E7	"Using Community PC Banking and Quicken", May 14, 2001, pp. 1-2, <a href="http://www.communitybankssb.net/quicken.htm">www.communitybankssb.net/quicken.htm</a>	
	E8	"PocketMoney to QIF Converter-Home", v0.1-28 July 2000, pp. 1-2, <a href="http://pm2qif.sourceforge.net/">http://pm2qif.sourceforge.net/</a>	
	E9	CRANE (Crane Federal Credit Union's), "Common Cents", April 2001, pp. 1-2, <a href="http://www.cranecu.org">www.cranecu.org</a>	
	E10	Information Concepts, Inc., "Fixed Price Software Development", May 17, 2001, p. 1, <a href="http://www.infoconcepts.com/v2/home.html">www.infoconcepts.com/v2/home.html</a>	
↓	E11	"QIF Converter For Online Transactions", May 17, 2001, p. 1, <a href="http://www.etfcu.org/files/Readme.txt">www.etfcu.org/files/Readme.txt</a>	

Examiner Signature	L. D. Gray	Date Considered	3/2/05
-----------------------	------------	--------------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box → +

PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031.  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)		<b>Complete if Known</b>	
Application Number	Not yet assigned	Filing Date	February 20, 2004
First Named Inventor	David S. MILLER	Group Art Unit	Not yet assigned
Examiner Name	Not yet assigned	Attorney Docket Number	31921-192598
Sheet 6	of 11		

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SUD	F1	Chapter 6, "Downloading and Using QIF Files", pp. 53-56	
	F2	VOICE, "General VOICE Meeting from 8/06/97", p. 1, <a href="http://www.os2voice.org/logs/V080697.LOG.html">www.os2voice.org/logs/V080697.LOG.html</a>	
	F3	INTUIT, "Intuit Introduces Online Investment Tracking In Quicken 98", MOUNTAIN VIEW, Calif. September 15, 1997, pp. 1-2, <a href="http://www.intuit.com/corporate/press_releases/091597e.html">www.intuit.com/corporate/press_releases/091597e.html</a>	
	F4	Microsoft, "H&R Block Switches from Solaris/Oracle to Microsoft .NET Enterprise Servers, Improves Scalability and Performance, March 2001, pp. 1-4, <a href="http://www.microsoft.com/">www.microsoft.com/</a>	
	F5	H&R BLOCK, "Archived Press Releases", April 26, 2001, pp. 1-6, <a href="http://www.hrblock.com/press_relations/archives_pr.jsp">www.hrblock.com/press_relations/archives_pr.jsp</a>	
	F6	H&R BLOCK, "H&R Block Brings Its Nationwide Network Of Tax Professionals Online To Offer Complete Anytime, Anywhere, Any Way Tax Support", KANSAS CITY, Mo., April 26, 2001, pp. 1-3, <a href="http://www.hrblock.com/press_relations/content/pr_2001_04.html">www.hrblock.com/press_relations/content/pr_2001_04.html</a>	
	F7	MICROSOFT BUSINESS, "An Open Standard for Tax Data Interchange Using TaxML", January 22, 2001, p. 1, <a href="http://www.microsoft.com/BUSINESS/government/resources/taxml.asp">www.microsoft.com/BUSINESS/government/resources/taxml.asp</a>	
	F8	PRICEWATERHOUSECOOPERS, "Develop a Professional Business Plan", September 28, 2000, pp. 1-2, <a href="http://www.microsoft.com/BUSINESS/ecommerce/build/pwc_develop.asp">www.microsoft.com/BUSINESS/ecommerce/build/pwc_develop.asp</a>	
	F9	MICROSOFT PRESSPASS, "Microsoft Adds Premium Content and Tools to Investor, Delivering Integrated, Comprehensive Service for Individual Investors", REDMOND, Wash., June 3, 1997, pp. 1-3, <a href="http://www.microsoft.com/PressPass/press/1997/Jun97/Invst4pr.asp">www.microsoft.com/PressPass/press/1997/Jun97/Invst4pr.asp</a>	
	F10	CYNTHIA NORMAN, Muir Software, Inc., "The Open Financial Exchange", pp. 1-6, <a href="http://www.ofx.net">www.ofx.net</a>	
V	F11	INTUIT, "Intuit Partners With American Century Investments To Offer Online Investment Tracking Through Quicken", MOUNTAIN VIEW, Calif., June 22, 1998, pp. 1-2, <a href="http://www.intuit.com/corporate/press_release/062398.html">www.intuit.com/corporate/press_release/062398.html</a>	

Examiner Signature	S. Ditz	Date Considered	3/2/05
--------------------	---------	-----------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box → +

PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)				<b>Complete if Known</b>	
Sheet	7	of	11	Application Number	Not yet assigned
				Filing Date	February 20, 2004
				First Named Inventor	David S. MILLER
				Group Art Unit	Not yet assigned
				Examiner Name	Not yet assigned
				Attorney Docket Number	31921-192598

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SUD	G1	MICHAEL L. SCHNEIDER, "Banking on a New Internet Standard", February 24, 1998, pp. 1-2, <a href="http://www.zdnet.com/products/content/pcmg/1704/277635.html">www.zdnet.com/products/content/pcmg/1704/277635.html</a>	
	G2	"OFX Specification Version 1.5.1", November 23, 1998, pp. 1-7, <a href="http://www.webbiz.com/151.html/">www.webbiz.com/151.html/</a>	
	G3	INTUIT, "Intuit, Top Technology Companies Team To Launch Intuit Osp Program, Mountain View, Calif., November 16, 1999, pp. 1-6, <a href="http://www.intuit.com/corporate/press_releases/111699.html">www.intuit.com/corporate/press_releases/111699.html</a>	
	G4	Open Financial Exchange, "Tax Forms", April 19, 2001, p. 1, <a href="http://www.ofx.net/ofx/fi_taxforms.asp">www.ofx.net/ofx/fi_taxforms.asp</a>	
	G5	INTUIT, "Award-Winning TurboTax For Business Offers Small Businesses Comprehensive Business-Specific Advice To File Their Taxes," SAN DIEGO, January 13, 1998, pp. 1-5, <a href="http://www.intuit.com/corporate/press_releases/011398b.html">www.intuit.com/corporate/press_releases/011398b.html</a>	
	G6	INTUIT, "Quicken TurboTax Debut For Tax Year 1999 Marks The Largest Retail Launch In Software Application History", SAN DIEGO, December 7, 1999, pp. 1-4, <a href="http://www.intuit.com/corporate/press_release/120799a.html">www.intuit.com/corporate/press_release/120799a.html</a>	
	G7	SIMSON L. GARFINKEL, "Web Banking Comes of Age", September 23, 1999, pp. 1-3, <a href="http://www.info-sec.com/commerce/99/commerce_100299a_j.shtml">www.info-sec.com/commerce/99/commerce_100299a_j.shtml</a>	
	G8	INTUIT, "Quicken 98 QIF Converter Instructions", May 14, 2001, pp. 1-2, <a href="http://fi.intuit.com/quicken98/qifalert.cfm">fi.intuit.com/quicken98/qifalert.cfm</a>	
	G9	"Yahoo! Search Results for +QIF", May 14, 2001, pp. 1-3, <a href="http://google.yahoo.com/bin/query?p=%2b.QIF&amp;hc=0&amp;hs=0">google.yahoo.com/bin/query?p=%2b.QIF&amp;hc=0&amp;hs=0</a>	
	G10	CDC FEDERAL CREDIT UNION, "Instructions for Exporting Account History to Quicken Using Web Connect", May 14, 2001, pp. 1-2, <a href="http://www.cdcfedcu.com/info/IBShistoryexport.html">www.cdcfedcu.com/info/IBShistoryexport.html</a>	
V	G11	OPEN FINANCIAL EXCHANGE, "Information Concepts Offers Implementation and Migration Toolkit", HERDON, VA., November 8, 1999, pp. 1-2, <a href="http://www.ofx.net/ofx/pressget.asp?id=41">www.ofx.net/ofx/pressget.asp?id=41</a>	

Examiner Signature	S. Ditz	Date Considered	3/2/05
--------------------	---------	-----------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box →



PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO		<b>Complete if Known</b>	
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)		Application Number	Not yet assigned
		Filing Date	February 20, 2004
		First Named Inventor	David S. MILLER
		Group Art Unit	Not yet assigned
		Examiner Name	Not yet assigned
Sheet 8 of 11	Attorney Docket Number	31921-192598	

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SMD	H1	OPEN FINANCIAL EXCHANGE, "BITS, Publishers of Open Financial Exchange and GOLD Team Announce Timetable for the Publication of Converged Specification", WASHINGTON, April 7, 1998, pp. 1-5, <a href="http://www.ofx.net/ofx/pressget.asp?id=17">www.ofx.net/ofx/pressget.asp?id=17</a>	
	H2	OPEN FINANCIAL EXCHANGE, "Microsoft Money and Intelidata First to Certify End-To-End OFX Solution", HERDON, March 5, 1998, pp. 1-3, <a href="http://www.ofx.net/ofx/pressget.asp?id=21">www.ofx.net/ofx/pressget.asp?id=21</a>	
	H3	OPEN FINANCIAL EXCHANGE, "Banks, Brokerage and Technology Companies Collaborate to Guide Open Financial Exchange", June 10, 1997, pp. 1-5, <a href="http://www.ofx.net/ofx/pressget.asp?id=3">www.ofx.net/ofx/pressget.asp?id=3</a>	
	H4	ROBERT BARKER, "Quicken vs. Money: And the Winner Is...", August 18, 2000, pp. 1-3, <a href="http://www.businessweek.com/bwdaily/dnflash/aug2000/nf20000818_650.htm">www.businessweek.com/bwdaily/dnflash/aug2000/nf20000818_650.htm</a>	
	H5	DANBURY AREA COMPUTER SOCIETY, INC., Volume 9, Issue 2, February 1998, pp.1-16, <a href="http://www.dacs.org">www.dacs.org</a>	
	H6	THERESA W. CAREY, "The best personal tax packages", May 14, 2001, pp. 1-3, <a href="http://coverage.cnet.com/Content/Reviews/Compare/Tax/index.html">coverage.cnet.com/Content/Reviews/Compare/Tax/index.html</a>	
	H7	CNET, "Electronic links of paperless taxes", May 14, 2001, pp. 1-2, <a href="http://coverage.cnet.com/Content/Reviews/Compare/Tax/ssl.html">coverage.cnet.com/Content/Reviews/Compare/Tax/ssl.html</a>	
	H8	"Instructions for Downloading & Printing Statements", May 14, 2001, pp. 1-3, <a href="http://gateway.fundspress.com/fibvw/instruction_downloads.htm">gateway.fundspress.com/fibvw/instruction_downloads.htm</a>	
	H9	"Feature Guide", May 14, 2001, pp. 1-2, <a href="http://manuals.sybase.com/onlinebooks/group-fs/fsg0110e/sfsfg/@Generic_BookText.../32">manuals.sybase.com/onlinebooks/group-fs/fsg0110e/sfsfg/@Generic_BookText.../32</a>	
	H10	GnuCash USER MANUAL, "Quicken QIF File Import", May 14, 2001, pp. 1-2, <a href="http://www.gnucash.org/docs/C/xacc-qif.html">www.gnucash.org/docs/C/xacc-qif.html</a>	
	H11	OPEN FINANCIAL EXCHANGE, "Solution Provider Profiles", May 14, 2001, pp. 1-34, <a href="http://www.ofx.net/ofx/fi_prof.asp">www.ofx.net/ofx/fi_prof.asp</a>	

Examiner Signature	S. Diaz	Date Considered	3/2/05
--------------------	---------	-----------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW



Please type a plus sign (+) inside this box → +

PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)				<b>Complete if Known</b>	
Sheet	9	of	11	Application Number	Not yet assigned
				Filing Date	February 20, 2004
				First Named Inventor	David S. MILLER
				Group Art Unit	Not yet assigned
				Examiner Name	Not yet assigned
				Attorney Docket Number	31921-192598

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SMJ	11	THE BUSINESS JOURNAL, "New tax-prep programs appeal to Quicken users", January 31, 1997, pp. 1-2, <a href="http://portland.bcentral.com/portland/stories/1997/02/03/focus4.html">portland.bcentral.com/portland/stories/1997/02/03/focus4.html</a>	
	12	OPEN FINANCIAL EXCHANGE, "Intuit Canada and Microsoft Canada Create Open Financial Exchange", January 20, 1997, pp. 1-4, <a href="http://www.ofx.net/ofx/pressget.asp?id=6">www.ofx.net/ofx/pressget.asp?id=6</a>	
	13	INTUIT, "Intuit's Turbotax Provides Expert Tax Advice And Filing Tips for Sweeping New Tax Laws", San Diego, CA, December 1, 1997, pp. 1-4, <a href="http://www.intuit.com/company/press_releases/1997/12-01/html">www.intuit.com/company/press_releases/1997/12-01/html</a>	
	14	CUCUG, "The Status Register", October 1997, pp. 1-31, <a href="http://www.cucug.org/sr/sr9710.html">www.cucug.org/sr/sr9710.html</a>	
	15	INTUIT, "Intuit and Microsoft Advance Financial Info Exchange on the Internet", Mountain View, CA, December 8, 1999, pp. 1-3, <a href="http://www.intuit.com/company/press_releases/1999/12-08b.html">www.intuit.com/company/press_releases/1999/12-08b.html</a>	
	16	TERRI STONE, "The Tax Man Cometh", December 23, 1997, pp. 2-3, <a href="http://www.computeruser.com/magazine/national/1525/news1525.html">www.computeruser.com/magazine/national/1525/news1525.html</a>	
	17	MacFixIt, "November 1999-a Archive Late-Breakers", November 1999, pp. 1-9, <a href="http://www.macfixit.com/archives/november.99.a.shtml">www.macfixit.com/archives/november.99.a.shtml</a>	
	18	BILL GATES, "Remarks by Bill Gates", Bellevue, WA, March 26, 1997, pp. 1-17, <a href="http://www.microsoft.com/BillGates/Speeches/industry&amp;tech/marble.asp">www.microsoft.com/BillGates/Speeches/industry&amp;tech/marble.asp</a>	
	19	OPEN FINANCIAL EXCHANGE, "Intelidata Certifies First End-to-End Open Financial Exchange Solution to Support Quicken®", Herndon, VA, June 24, 1998, pp. 1-3, <a href="http://www.ofx.net/ofx/pressget.asp?id=22">www.ofx.net/ofx/pressget.asp?id=22</a>	
	110	TALK CITY, "Wingspan Bank Presents Bill Wallace, Executive Vice President and Chief Information Officer WingspanBank.com", November 16, 1999, pp. 1-2, <a href="http://www.talkcity.com/transcripts/WingspanBank/11-16-1999.1-1.html">www.talkcity.com/transcripts/WingspanBank/11-16-1999.1-1.html</a>	
	111	TALK CITY, "Wingspan Bank Presents Bill Wallace, Executive Vice President and Chief Information Officer WingspanBank.com", November 16, 1999, pp. 1-2, <a href="http://www.talkcity.com/transcripts/WingspanBank/11-16-1999.1-2.html">www.talkcity.com/transcripts/WingspanBank/11-16-1999.1-2.html</a>	

Examiner Signature	S. Diaz	Date Considered	3/2/05
-----------------------	---------	--------------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

PC Docs No. 523554

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box →



PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO				<b>Complete if Known</b>	
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)				Application Number	Not yet assigned
				Filing Date	February 20, 2004
				First Named Inventor	David S. MILLER
				Group Art Unit	Not yet assigned
				Examiner Name	Not yet assigned
				Attorney Docket Number	31921-192598
Sheet	10	of	11		

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SMD	J1	Screenshots from the electronic publication, TaxCut 1994 Filing Edition, distributed via floppy.	
	J2	Electronic publication entitled "TaxCut 1995 Filing Edition", distributed via 4 3/5" floppy disks, copyright 1995-96.	
	J3	Screenshots from the electronic publication, Tax Cut 1995 Filing Edition, distributed via 4 3/5" floppy disks, copyright 1995-96.	
	J4	Cover of box from distribution of electronic publication, Tax Cut 1995 filing Edition, copyright 1996.	
	J5	Kiplinger TaxCut User Guide for the 1995 Tax Season, copyright 1987-1995.	
	J6	Printout of selected portions of the Help file from the electronic publication, TaxCut 1995 Filing Edition, distributed via 4 3.5" floppy disks, copyrighted 1995-96.	
	J7	Electronic publication entitled "TaxCut 1996 Filing Edition", distributed via 4 3/5" floppy disks, copyright 1996-97.	
	J8	Screenshots from the electronic publication, Tax Cut 1996 Filing Edition, distributed via 4 3.5" floppy disks, copyright 1996-97.	
	J9	Cover of box from distribution of electronic publication, Tax Cut 1996 Filing Edition, copyright 1997.	
	J10	Intuit Press Release of January 30, 1996, entitled "Intuit Announces 15 More Financial Institutions To Deliver Online Banking".	
	J11	Intuit Press Release of December 17, 1996, entitled "More Small Businesses Find Success As They Go Online".	

Examiner Signature	S. Diaz	Date Considered	3/2/05
-----------------------	---------	--------------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box →



PTO/SB/08A (08-00)



Approved for use through 10/31/2002. OMB 0651-0031

U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

Substitute for form 1449A/PTO		<b>Complete if Known</b>	
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)		Application Number	Not yet assigned
		Filing Date	February 20, 2004
		First Named Inventor	David S. MILLER
		Group Art Unit	Not yet assigned
		Examiner Name	Not yet assigned
		Attorney Docket Number	31921-192598
Sheet	11	of	11

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SMD	K1	Microsoft Press Release of November 18, 1996, entitled "Microsoft Announces Availability of Active Statement Technology For Microsoft Money 97".	
	K2	"Taxing Matters: Updating Technology at the Internal Revenue Service", Wasson, J.; Vol. 7, Issue 2, <u>EDI Forum</u> (1994) p.59-63 (ISSN: 1048-3047).	
	K13	"State Tax Reporting Via the Electronic Highway", Lyon, J.; Vol. 6, Issue 3, <u>EDI Forum</u> , (1993) p. 30-35 (ISSN: 1048-3047).	
	K14	"This Just In Getting Back to Business: Tax Prep Software Doesn't Add Up To 1040. Expect More For the Money from 1065, 1120, and 1120S Business Tax Software This Season.", Cohn, M.; <u>Accounting Technology</u> , (January 1996) p. 29-39.	
	K15	Kiplinger TaxCut Quick Start Guide; Filing Edition-Tax Year 1996.	
	K16	"Open Exchange", September 16, 1996, pp. 1-11, <a href="http://www.intuit.com/corporate/press_releases/091696_white_paper.html">www.intuit.com/corporate/press_releases/091696_white_paper.html</a>	
	K17	Auditing the IRS", McTague, Jim; 12/23/96 Barrons 29, p. 1-9	

Examiner Signature	S. Diaz	Date Considered	3/2/05
-----------------------	---------	--------------------	--------

\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

**VENABLE**  
ATTORNEYS AT LAW

Please type a plus sign (+) inside this box

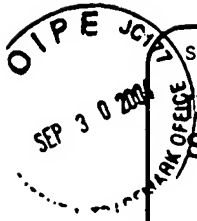


PTO/SB/08A (08-00)



Approved for use through 10/31/2002. OMB 0651-0031  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number



Substitute for form 1449A/PTO

## INFORMATION DISCLOSURE STATEMENT BY APPLICANT

(use as many sheets as necessary)

Sheet 1 of 1

### Complete if Known

Application Number	10/782,977
Filing Date	February 23, 2004
First Named Inventor	David S. MILLER
Group Art Unit	3627
Examiner Name	MEINECKE DIAZ, Susanna M.
Attorney Docket Number	31921-192598

### OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS

Examiner Initials *	Cite No. 1	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T 2
SD	A1	Beamer, Scott. "A Marriage of Convenience." MacUser, vol.3, no. 3, page 102(4), March 1987.	
J	A2	Meadows, Laura Lou. "Faster Refunds with Electronic Filing: Computerizing Your Relationship with the IRS." PC Magazine, col. 9, no. 4, page 388(2), February 27, 1990.	
J	A3	Anonymous. "Electronic Tax Payment Through TAXLINK Discussed in IRS Procedure." Standard Federal Tax Reports, vol. 80, no. 25, page 4, June 9, 1993.	

Examiner Signature	SD Diaz	Date Considered	3/2/05
-----------------------	---------	--------------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

582746

VENABLE  
ATTORNEYS AT LAW

PLEASE type a plus sign (+) inside this box →

+



PTO/SB/08A (08-00)

Approved for use through 10/31/2002. OMB 0651-0031  
U.S. Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number.

<b>Substitute for form 1449A/PTO</b>  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  <i>(use as many sheets as necessary)</i>		<b>Complete if Known</b>			
		Application Number	10/782,977		
		Filing Date	February 23, 2004		
		First Named Inventor	David S. MILLER		
		Group Art Unit	3627		
		Examiner Name	Not yet assigned		
Sheet	1	of	2	Attorney Docket Number	31921-192598

U.S. PATENT DOCUMENTS						
Examiner Initials	Cite No. <sup>1</sup>	U.S. Patent Document		Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear
		Number	Kind Code <sup>2</sup> (if known)			
SMD ↓	A1	4,970,655		Winn	11/13/1990	
	A2	5,644,724		Cretzler	07/01/1997	
	A3	5,737,592		Nguyen	04/07/1998	
	A4	6,202,052	B1	Miller	03/13/2001	
	A5	6,697,787		Miller	02/04/2004	

FOREIGN PATENT DOCUMENTS								
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document			Name of Patentee or Applicant of Cited Document	Date of Publication of Cited Document MM-DD-YYYY	Pages, Columns, Lines, Where Relevant Passages or Relevant Figures Appear	T <sub>6</sub>
		Office <sup>3</sup>	Number <sup>4</sup>	Kind Code <sup>5</sup> (if known)				
SMD	BI	US	90/05341		Winn	05/17/1990		

Examiner Signature	S. Diaz	Date Considered	3/2/05
--------------------	---------	-----------------	--------

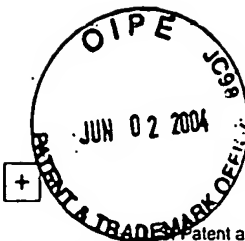
<sup>\*</sup> EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> See attached Kinds of U.S. Patent Documents. <sup>3</sup> Enter Office that issued the document, by the two-letter code (WIPO Standard ST.3). <sup>4</sup> For Japanese patent documents, the indication of the year of the reign of the Emperor must precede the serial number of the patent document. <sup>5</sup> Kind of document by the appropriate symbols as indicated on the document under WIPO Standard ST. 16 if possible. <sup>6</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

DC2 534375

**VENABLE**  
ATTORNEYS AT LAW



Please type a plus sign (+) inside this box

+

PTO/SB/08A (08-00)

+

Approved for use through 10/31/2002. OMB 0651-0031

Patent and Trademark Office: U.S. DEPARTMENT OF COMMERCE

Under the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless it contains a valid OMB control number

<b>Substitute for form 1449A/PTO</b>  <b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  (use as many sheets as necessary)  Sheet 2 of 2				<b>Complete if Known</b>	
				Application Number	10/782,977
				Filing Date	February 23, 2004
				First Named Inventor	David S. MILLER
				Group Art Unit	3627
				Examiner Name	Not yet assigned
				Attorney Docket Number	31921-192598

OTHER PRIOR ART -- NON PATENT LITERATURE DOCUMENTS			
Examiner Initials *	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published.	T <sup>2</sup>
SUP	C1	Filing Govt. Statements Electronically, Harper, Robert M., Jr.; Hoffman, Michael R, Journal of Accounting & EDP, v2, n2, pp 52-56, Summer 1986	
	C2	Computers and the Tax Professional. Throneberry, Mary Beth; Malley, John C.; Wallace, William D., National Public Accountant, v32, n5, pp. 20-24, May 1987	
	C3	Make April 15 less taxing—TurboTax finds deductions even accountants miss., Middleon, Timothy, Computer Life, March 1, 1995, v2, n3, pp. 159-162	
	C4	CA-Infopoint Combined Interest Reporting. Computer Associates International, Inc., DR 01/90	

Examiner Signature	S. Diaz	Date Considered	3/2/05
-----------------------	---------	--------------------	--------

\* EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

<sup>1</sup> Unique citation designation number. <sup>2</sup> Applicant is to place a check mark here if English language Translation is attached.

SEND TO: Assistant Commissioner for Patents, Washington, DC 20231.

VENABLE  
ATTORNEYS AT LAW

DC2 534375